Determination of Need for IT Review and/or Involvement by DIRM

Checklist Detail

		Yes	No
1.	**Will/Does the procurement include services for professional and/or personal service contractors for the purpose of performing IT related services in excess of $5,000?** *Examples: computer programming support; computer systems analysis; computer systems security; database management service; database administration; database monitoring/tuning/backup/recovery; data storage planning and monitoring; electronic document management services; middleware services; IT project management services; IT technical writer; IT supplemental staff; IT management; IT standards/best practices for development and deployment; IT vendor/contract management; data modeling; IT gap analysis*	☐	☐
2.	**Will/Does the procurement include any activities for software development, enhancement, or maintenance (regardless of specific technical environment)?** *Examples: system design; feasibility studies; requirements definition; development of an RFI/RFP/RFQ/RFA or IT contract; web development; analysis and programming related to delivery of reports/statistical analysis; data conversion planning and execution*	☐	☐
3.	**Will/Does the procurement include Hardware or Software, including: (a) the purchase, lease, rent, or repair and maintenance of IT equipment; (b) the purchase, development, lease, rent or maintenance of computer software; or (c) related consulting services (in excess of $5,000 as part of a service contract)?** *Examples: PCs, servers, scanners, printers, commercial off-the-shelf applications (COTS), customized systems, maintenance on hardware and/or software, IT support, IT Disaster Backup and recovery*	☐	☐
4.	**Will/Does the procurement include Telecommunications or Networking Services components, including: (a) the purchase, lease, rent, or repair and maintenance of telecommunications equipment; (b) the purchase, development, lease, rent, or maintenance of networking services; or (c) related consulting services other than standard internet connections?** *Examples: telephone and data communications services and cable installations from the Office of Information Technology Services (ITS) or vendors; desktop support; local area network (LAN) design/implementation/support/ administration; electronic commerce/EDI services; GIS services; wireless networking; e-mail services; ISP services; infrastructure planning/deployment/operations such as hardware platforms, computer-related equipment, telecommunications, systems software, operating systems, and connectivity requirements; configuration management Note: Does not include internet connection via standard browsers as provided by the State.*	☐	☐
5.	**Will/Does the procurement include system hosting services?** *Examples: web hosting; data warehouse hosting*	☐	☐
6.	**Will/Does the procurement include IT Training in excess of $5,000?** *Examples: expenses for employee education, training, and registration fees including associated travel costs for IT related training; assessment of IT training needs; classroom, media-based or other training services*	☐	☐
7.	**Will/Do the IT expenditures exceed $100,000 over five years?** *SB991 requires Project Approval for any initiative with total life cycle costs in excess of $100,000. Total life cycle costs include costs extending to five years of operations and maintenance costs after implementation costs have ceased. The costs include internal personnel expenses, which should be approximated as 'order of magnitude' estimates. More information can be found on the State Chief Information Officer's website:* http://www.its.state.nc.us/Information/ITPlansBudgetsProjects/ **If yes, project staff should work with DIRM Quality Assurance/DIRM Projects Office on SB991 reporting.**	☐	☐
8.	**Will/Does the procurement include ongoing maintenance and/or ongoing operations costs?** *Examples: hardware or software maintenance; product release support; help desk support/operations; computer operations support; scheduling and control operations; printing and distribution operations; data warehouse operations; IT disaster backup and recovery* **If yes, ensure that the materials submitted to DIRM for review include the plan for maintaining and funding the ongoing costs.**	☐	☐
9.	**Will/Does the procurement include any other IT service expenses that are related to IT, but are not identified above?** *Examples: IT graphics and presentation services; IT organizational planning; IT research activities such as research or evaluation requiring specialized access to DHHS computer systems; HIPAA; IT security/security planning; IT policies/procedures for development and deployment; IT architectural design/review; negotiation for an IT vendor/contract; IT quality assurance activities; data entry operations; IT product and services initial reviews* **If yes, indicate: _____**	☐	☐

Last Modified: January 14, 2008

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Checklist Summary

Requesting Agency:_____

Type of procurement:
- □ **Contract**
- □ **Contract Amendment**
- □ **Request for Application (RFA)**
- □ **Request for Information (RFI)**
- □ **Request for Proposal (RFP)**
- □ **Request for Quotes (RFQ)**
- □ **Other (specify)** _____

For a contract or contract amendment, specify the following:

    Contractor: _____

    Contract # / DHHS Contract System: _____

    Contract Title: _____

Agency Contract Office Coordinator for this Procurement:_____

    Telephone #:_____

    E-mail: _____

This procurement document requires DIRM review and approval, prior to any RFP issuance, vendor selection, contract/vendor management, and/or procurement activities.
- □ **YES**
- □ **NO**

Has a federal agency required or recommended specific IT products or services for this procurement?
- □ **YES**
- □ **NO**

Signature of Authorized
Contract Office Staff _____ **Date** _____

Signature of Authorized
Programmatic Staff _____ **Date** _____